



Financial Aid PRP 2 & 3 Overview

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Introduction

The Image/Upgrade Overview Document is intended to provide ctcLink users with a summary of the changes that will be made in the system as a result of the upcoming image or PeopleTools upgrade implementation. Oracle releases multiple PeopleSoft updates, called images, for each pillar every year. Each Image contains bug fixes and features that are important for PeopleSoft to work well. PeopleTools upgrades update the underlying framework of the system. There are minimal changes that are noticeable to the end users. Below is an overview of the changes that you can expect to see as part of this upgrade.

Financial Aid

BUDGET FORMULAS PAGE UPDATE

Sequence numbers have been added to the Formula Definition criteria on the Budget Formula Tab, and the Student Groups on the Budget Formula Groups tab on the Budget Formulas page. This is a cosmetic change and does not impact functionality.

Navigation

Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > Budgets > Budget Formulas

Image: Budget Formulas Page - Budget Formula Tab

Budget Formulas New Window | Help

Budget Formula | Budget Formula Groups

Academic Institution Category **BOOK** Books/Supplies Aid Year **2023** Copy Setup Data

Formula Definition Find First 1 of 2 Last

*Effective Date *Status

Formula Detail Find | View 1 First 1-7 of 7 Last

Formula Number *Processing Order Amount

*Budget Item Code Budget Multiplier Field

*Description Short Description

Formula Definition Personalize | Find | 1-2 of 2

	*Field Name	*Operation	*Field Value	AND/OR		
1	<input type="text" value="FA_LOAD"/>	<input type="text" value="="/>	<input type="text" value="N"/>	<input type="text" value="AND"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
2	<input type="text" value="REFUND_SETID"/>	<input type="text" value="BLK"/>		<input type="text" value=""/>	<input type="button" value="+"/>	<input type="button" value="-"/>

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[2022-2023 Aid Year Roll Over Business Process Guide](#)

2022 - 2023 COD EDIT CODE UPDATES

The text was updated for the following for COD Edit Codes in line with recent changes for 2022-2023.

- Edit 227 (Added) - Payment Period End Date submitted is less than or equal to the Payment Period Start Date
- Edit 043 (Modified) - Award Received Prior to Start of Processing Year or New Award or Increase to the Award Amount is Received After the School is Confirmed Closed Out or After the End of Processing Year Without Reopen/Extended Processing
- Edit 071 (Modified) - New Disbursement (DRI = True) or Disbursement Increase Received Prior To Start of Processing Year or After the School Confirmed Closed Out or After End of Processing Year Without Reopen/Extended Processing
- Edit 205 (Modified) - Payment Period Start Date is outside the Award Begin and End dates. Payment Period End Date is outside the Award Begin and End dates.

2022 - 2023 AID YEAR UPDATES FOR PELL AND DIRECT LOAN PROCESSING

Pell and Direct Loans can now be processed for the 2022-2023 aid year, to include origination, disbursement, generating COD files, and loading COD response files. This involved a number of necessary changes tied to the new COD 5.0a schema for 2022-2023, as well as retiring the 2.0 and 3.0a-e schemas. In addition, an update was delivered to accommodate the Grantee UEI (Unique Entity Identifier) Number field in the Pell Grant Electronic Statement of Account (ESOA) Report.

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[Loan Processing Business Process Guide](#)

[Pell Processing Business Process Guide](#)

2022 - 2023 DIRECT LOAN FIELD CHANGES

New Direct Loan fields were added to ctcLink that come with the new schema: Direct Loan Attendance Cost and Payment Period Start and End Dates. These can be found in the origination and disbursement files, as well as on the following pages in ctcLink.

Pages Impacted

- Nav Bar > Navigator > Financial Aid > Loans > Direct Lending Management > Manage DL Application > Application Financial tab > Disbursement tab
- Nav Bar > Navigator > Financial Aid > File Management > COD Full Participant > View COD Data > COD Award tab
- Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > Aid Year > Valid Terms for Career
- Nav Bar > Navigator > Financial Aid > Loans > Direct Lending Management > Manage DL Application > Application Financial tab > SULA tab > SULA Disbursement Fields link
- Nav Bar > Navigator > Financial Aid > File Management > COD Full Participant > View COD Data > COD Disbursement tab
- Nav Bar > Navigator > Financial Aid > Pell Payment > Manage Pell Payment > Pell Disbursement tab > Disbursement Detail link > GEPL Action Detail link

Navigation

Nav Bar > Navigator > Financial Aid > Loans > Direct Lending Management > Manage DL Application > Application Financial tab > Disbursement tab

Image: Manage Direct Loan Application Page – Application Financial tab

ctcLink CS Staff Homepage Manage Direct Loan Application

Application Bio/Demo | Application Misc Data | **Application Financial** | Application Acknowledgement

ID [REDACTED] Institution [REDACTED]
Career UGRD Undergraduate Aid Year 2023
Loan Type DSB1 Subsidized Stafford Loan 1 Appl Seq 1 [Loan Status Summary](#)

Loan Application Data

Acad Year Start Date	07/01/2022	Loan Period Start	09/21/2022	<input type="checkbox"/> Override Loan Dates
Academic Year End Date	06/16/2023	Loan Period End	06/16/2023	<input type="checkbox"/> Override Loan Period
Direct Loan Attendance Cost	\$27,033	Loan Certification Date	06/16/2022	

Navigation

Nav Bar > Navigator > Financial Aid > File Management > COD Full Participant > View COD Data > COD Disbursement tab

Image: View COD Data Page - COD Disbursement tab

Application Bio/Demo View COD Data

COD Document | COD School Information | COD Student | COD Award | **COD Disbursement**

Document ID 2022-06-16T22:03:47.29 [REDACTED] Reporting School ID [REDACTED]
ID [REDACTED] Attended School ID [REDACTED]

Award Information

Award Name DLSubsidized Award Year 2023
Award Number 1

Disbursement Information

Disbursement Number	1	Enrollment Status	[REDACTED]
Disbursement Amount	1167.00	Program CIP Code	[REDACTED]
Disbursement Date	2022-09-13	CIP Code Year	[REDACTED]
Disbursement Release	false	First Disbursement	[REDACTED]
Disbursement Sequence	01	Disbursement Fee Amount	[REDACTED]
Previous Disb Seq Nbr		Disbursement Rebate Amount	[REDACTED]
Note Message		Disbursement Net Amount	[REDACTED]
Payment Period Start Date	2022-09-21	Disbursement Confirmation	[REDACTED]
Payment Period End Date	2022-12-15	Enrollment School Code	[REDACTED]
Published Pgm Length Years	2.000	Weeks Programs Academic Year	[REDACTED]
Published Pgm Length Months		Special Programs	[REDACTED]
Published Pgm Length Weeks		Program Credential Level	[REDACTED]
Incarcerated Student Indicator		Response Code	[REDACTED]

[Response Information](#)

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

[COD Document](#) | [COD School Information](#) | [COD Student](#) | [COD Award](#) | [COD Disbursement](#)

Navigation

Nav Bar > Navigator > Financial Aid > File Management > COD Full Participant > View COD Data > COD Award tab

Image: View COD Data Page - COD Award tab

The screenshot displays the 'View COD Data' interface with the 'COD Award' tab selected. The document ID is 2022-06-16T22:03:47.29. The award name is 'DLSubsidized' with an amount of 3500.00. The award year is 2023 and the number is 1. A 'Response Information' link is provided for the award amount. The 'Award' section includes details like Loan Key 1, Award ID, and Award Create Date (2022-06-16). The 'Application' section shows a 'Direct Loan Attendance Cost' of 27033. The 'Financial' section is partially visible at the bottom.

Document ID	2022-06-16T22:03:47.29	Reporting School ID	
ID		Attended School ID	

Award Block

Award Name	DLSubsidized	CPS Transaction Number	02
Award Year	2023	Note Message	
Award Number	1	Response Code	
Award Amount	3500.00	Response Information	

Pell Information

Loan Information

Award

Loan Key	1	Additional Loan Information	Default/Overpayment	N
Award ID			HPPA Indicator	
Award Create Date	2022-06-16		PreProfessional Coursewrk	
Dependency Status	1		Additional Unsub Indicator	
Entrance Counseling				
Entrance Counseling Response				

Application

Direct Loan Attendance Cost	27033	Application Completion Date	
Award Amount Requested		Application Loan Amount	
Application Submission Reason		Maximum Loan Indicator	
Previous Application ID		Loan Period Start Date	
Application ID		Loan Period End Date	
Unknown Loan Amount			

Financial

Booked Loan Date		Credit Balance Option	
Booked Loan Amount		School Credit Balance Option	

2022 - 2023 PELL FIELD CHANGES

The Pell field Incarcerated Code field was retired and the new Incarcerated Student Indicator field found in the new schema was added to ctcLink. This can be found in the origination and disbursement files, as well as on the following pages in ctcLink.

Navigation

Nav Bar > Navigator > Financial Aid > Pell Payment > Manage Pell Payment > Pell Disbursement tab

Image: Manage Pell Payment Page - Pell Disbursement tab

The screenshot shows the 'Manage Pell Payment' interface with the 'Pell Disbursement' tab selected. The page includes a navigation bar, a breadcrumb trail, and a table of disbursement details. The 'Incarcerated Student Code' column is highlighted with a red box.

Item Type	Disbt ID	Pell Disbt Amount	Pell Disbt Date	Pell Actual Disbt Date	Pell Disbt Status	Action Code	Pell YTD Disbt	Incarcerated Student Code
911000000000	01	\$2298.00	09/13/2022		Originated			
911000000000	02	\$2299.00	12/27/2022		Originated			
911000000000	03	\$2298.00	03/27/2023		Originated			

Buttons: Save, Return to Search, Notify

Page Footer: Pell Origination | Pell Disbursement | Pell Disb/Career

Navigation

Nav Bar > Navigator > Financial Aid > File Management > COD Full Participant > View COD Data > COD Disbursement tab

Image: View COD Data Page - COD Disbursement tab

The screenshot displays the 'View COD Data' interface for the 'COD Disbursement' tab. At the top, there are navigation tabs for 'COD Document', 'COD School Information', 'COD Student', 'COD Award', and 'COD Disbursement'. Below these, document and school identifiers are shown. The main content area is divided into two sections: 'Award Information' and 'Disbursement Information'. The 'Award Information' section shows one award: Pell, Award Year 2023, Award Number 1. The 'Disbursement Information' section lists various fields such as Disbursement Number, Amount, Date, Release, Sequence, Fee Amount, Rebate Amount, Net Amount, Confirmation, School Code, Program CIP Code, CIP Code Year, First Disbursement, Disbursement Rebate Amount, Net Amount, Confirmation, Enrollment School Code, Weeks Programs Academic Year, Special Programs, Program Credential Level, and Response Code. A red box highlights the 'Incarcerated Student Indicator' field. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

2022 - 2023 COLLEGE FINANCING PLAN UPDATES

The 2022-2023 College Financing Plan now contains a new section that displays the sum of awarded VA Education Benefits. This is a new Award Group that can be configured based off of an Item Type's Fin Aid Type, FA Source, and Federal ID. The Print Letter option on the FA Item Type 2 tab of the FA Item Type configuration page needs to be set to "Print" in order to be included in the calculation on the College Financing Plan. The total of the college-defined VA Education Benefits that display on the College Financing Plan are included in the calculation of the Net Price to You value.

A fix was also installed to address a bug identified by Oracle where the checkbox "Allow display with no awards" would still allow a student to open their College Financing Plan from student self-service, even if the box was not checked. We have confirmed this fix resolves the issue.

On the College Financing Plan setup page, Federal Parent PLUS Loan and Income Share Agreement fields were removed from the Item Type Inclusion Exceptions section of the Award Mapping tab. The Institution Loan, Parent PLUS Loan, and Income Share Agreement values were removed from the Interest Rate and Work Hours tab.

Navigation

Student Homepage > Financial Aid > Aid Year link > College Financing Plan link

Image: College Financing Plan Page - Student View

06 / 21 / 2022
[Download](#)

Total Cost of Attendance 2022-2023

	On Campus Residence	Off Campus Residence
Tuition and fees	\$5,100	
Housing and meals		\$16,053
Books and supplies	\$1,134	
Transportation	\$1,935	
Other education costs	\$1,800	
Estimated Cost of Attendance		\$26,022 / yr

Expected Family Contribution

Based on FAFSA As calculated by the institution using information reported on the FAFSA or to your institution.	0 / yr
Based on Institutional Methodology Used by most private institutions in addition to FAFSA.	0 / yr

Scholarship and Grant Options

Scholarships and Grants are considered "Gift" aid - no repayment is needed.

Scholarships		Grants	
Merit-Based Scholarships		Need-Based Grant Aid	
Scholarships from your school	\$0	Federal Pell Grants	\$6,895
Scholarships from your state	\$0	Institutional Grants	\$0
Other scholarships	\$0	State Grants	\$4,467
Employer Paid Tuition Benefits	\$0	Other forms of grant aid	\$0
Total Scholarships	\$0 / yr	Total Grants	\$11,362 / yr

VA Education Benefits

VA Education Benefits	\$2,209 / yr
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College Costs You Will Be Required to Pay

Net Price To You (Total cost of attendance minus total grants and total scholarships)	\$12,451 / yr
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Loan and Work Options to Pay the Net Price to You

You must repay loans, plus interest and fees.

Loan Options*		Work Options	
Federal Direct Subsidized Loan (3.73% interest rate) (1.06% origination fee)	\$3,500 / yr	Work-study	\$0 / yr
Federal Direct Unsubsidized Loan (3.73% interest rate) (1.06% origination fee)	\$6,000 / yr	Hours Per Week (estimated)	0 / wk
Total Loan Options	\$9,500 / yr	Other Campus Job	\$0 / yr
		Total Work	\$0 / yr

* For federal student loans, origination fees are deducted from loan proceeds.

Other Options

You may have other options to repay the remaining costs. These include:

- Tuition payment plan offered by the institution
- Parent PLUS loans, which your parent can apply for
- Non-Federal Private education loan, which you or your parent can apply for after passing a credit check
- Other Military or National Service Benefits

Customized Information from SCC

The estimated figures on this College Financing Plan are meant to help you easily compare financial aid packages offered by different institutions, and ultimately make an informed decision on where to invest in your higher education. Although we've done our best to accurately calculate these figures, please remember these are only estimates. Should you choose to attend our institution, your final figures could differ. For more information please visit the website [HERE](#).

For More Information

[Financial Aid Office](#)
[Financial Aid Office](#)
[Financial Aid Office](#)
[Financial Aid Office](#)
[Financial Aid Office](#)

* Loan Amounts

Note that the amounts listed are the maximum available to you. To learn about loan repayment choices and calculate your Federal Loan monthly payment, go to: <https://studentaid.gov/h/manage-loans>.

Next steps

Navigation

Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > College Financing Plan

Image: College Financing Plan Page - Award Mapping Tab

College Financing Plan

[Budget Mapping](#) | **[Award Mapping](#)** | [Housing Mapping](#) | [Interest Rates and Work Hours](#)

Institution [redacted]
Aid Year 2023
Group SHOPGRP01

Award Group Mapping | Personalize | Find | View All | First 2-6 of 10 Last

*Award Group	Fin Aid Type	Source	Federal ID		
2 Fed Direct Subsidized Loan	Loan	Federal	Fed Stafford Loan - Subsidized	+	-
3 Fed Direct Unsubsidized Loan	Loan	Federal	Fed Stafford Loan-Unsubsidized	+	-
4 Scholarships from your state	Scholarship	State		+	-
5 Other scholarships you can use	Scholarship	Private		+	-
6				+	-

Assistantships
Employer Paid Tuition Benefits
Fed Direct Subsidized Loan
Fed Direct Unsubsidized Loan
1 Federal Pell Grant
Grad Plus Federal Loan
HRSA Loans
Institutional Grants
Group Other Aid That Must Be Repaid
Other Campus Job
Other forms of Grant Aid
Other scholarships you can use
Scholarships for Disadvantaged Students
Scholarships from your school
Scholarships from your state
School-Paid Tuition Benefits
State Grants
Tuition Remission/Waiver
VA Education Benefits
Work Study

Personalize | Find | View All | First 1 of 1 Last

Item Type Description

+

Mapping | Award Mapping | Housing Mapping | Interest Rates and Work Hours

Navigation

Nav Bar > Navigator > Set Up SACR > Product Related > Financial Aid > Awards > Financial Aid Item Types

Image: Financial Aid Item Types Page - FA Item Type 1 Tab

Financial Aid Item Types

Process List | Home | Search | Flag | Settings | Refresh

New Window | Help | Personalize Page

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6

SetID [Redacted]
Item Type 951000000100 Chapter 31 VA Benefits
Aid Year 2023 2022-2023 Financial Aid Year

FA Item Type Setup Find | View All First 1 of 1 Last

*Effective Date 01/01/1901 *Status Active Copy

*Description Chapter 31 VA Benefits Short Description CHPT31BENF

Financial Aid Type VA Benefits Source Other Federal ID

Aggregate Area Institution Reporting Cd

Comments

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6

Image: Financial Aid Item Types Page - FA Image Type 3 Tab

Financial Aid Item Types

Process List | Home | Search | Flag | Settings | Refresh

New Window | Help | Personalize Page

FA Item Type 1 | FA Item Type 2 | **FA Item Type 3** | FA Item Type 4 | FA Item Type 5 | FA Item Type 6

SetID [Redacted]
Item Type 951000000100 Chapter 31 VA Benefits
Aid Year 2023 2022-2023 Financial Aid Year

Award Attributes Find | View All First 1 of 1 Last

Effective Date 01/01/1901 Status: Active

Pass Anticipated Aid No Anticipate Anticip Aid Expiration Days 30

Disbursement Method No Auto Cancel Item Type

Signature Required Manual Authorization Include in Transcript

Print Letter Option Print Print as Award Item Print as Other Resource

Self Service Actions
 Accept Reduce Decline

Award Letter Print Award Message

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History

FA Item Type 1 | FA Item Type 2 | FA Item Type 3 | FA Item Type 4 | FA Item Type 5 | FA Item Type 6

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[2022-2023 Aid Year Roll Over Business Process Guide](#)

RETURN OF TITLE IV FUNDS 49% OVERRIDE

Added a Use 49% Override check box to the Create RTIV Worksheet and Return TIV Session pages, which sets the Pct. TIV Aid Earned value to 100%. When the box is checked, a message pops up to prompt that this is an override and requires that user to verify that the student meets the 49% withdrawal exemption.

Selecting the Use 49% Override checkbox on the Create Worksheet page also sets the Pct. TIV Aid Earned value to 100%, and automatically calculates the Completed Days and Total Days values, eliminating the need for overriding those values on the Calculate Pct TIV Aid Earned link.

Navigation

Nav Bar > Navigator > Financial Aid > Return to Title IV Funds > Return TIV Session

Image: Return TIV Session Page – Return TIV Session Tab

The screenshot displays the 'Return TIV Session' page. At the top, there is a navigation bar with a back arrow and the text 'Return TIV Session'. Below this, there are two tabs: 'Return TIV Session' (active) and 'Return TIV Session Notes'. The main content area shows session details for Institution, Aid Year (2022), Academic Career (UGRD Undergraduate), Term (2223 SPRING 2022), Term Begin Date (04/04/2022), and Term Ending Date (06/17/2022). A 'Calculate All' button is visible. A 'Message' dialog box is open, asking 'Do you want to proceed with the 49% override (14442,56)'. The message text reads: 'By proceeding, you have previously confirmed that the student meets the 49% withdrawal exemption. You must invoke the Calculate All function in order to apply this override.' Below the message is an 'OK' button. In the 'Period Summary' section, the 'Pct. TIV Aid Earned for Period' is shown as 100.00. A 'Percent Completion' section contains a checked checkbox for 'Use 49% Override'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', and 'Next tab', along with 'Add' and 'Update/Display' buttons.

Return TIV Session | Return TIV Session Notes






Navigation

- Nav Bar > Navigator > Financial Aid > Return to Title IV Funds > Create Worksheet >> Return TIV Aid tab
- Nav Bar > Navigator > Financial Aid > Return to Title IV Funds > Create Worksheet >> Return of Funds Worksheet

Image: Return of Funds Worksheet HERA – Return TIV Aid Tab



< Contributor Relations Homepage **Return of TIV Worksheet HERA**

Return TIV Aid | Return of Funds Worksheet | Student/School Return | Post-Withdrawal Disbursement | Return TIV Aid Notes



Institution [REDACTED] ID [REDACTED]  
 Term 2223 SPRING 2022 Aid Year 2022   
 Program Type Credit Hour Program
 FA Term Academic Career UGRD **Calculate All**

Student Status FA Term

Summary

Date of Withdrawal 05/10/2022  Undetermined Withdrawal Date Days Elapsed 0 Last Updated
 *Overall Status Pending *Institutional Determination Dt 06/16/2022  Date Form Completed

Period Information






Payment Period Enrollment Period *Start Date 04/04/2022  *End Date 06/17/2022 

Term Information

Term 2223 Withdraw Date 60 Pct Dt 05/19/2022 Term Begin Date 04/04/2022
 FA Term Withdrawal Date Use 49% Override Term End Date 06/17/2022

Session Information

Session 1 Withdraw Date 60 Pct Dt 05/19/2022 Session Period Begin Date 04/04/2022
 Session Withdrawal Date 05/10/2022 60 Pct Effective Dt 05/18/2022 Session Period End Date 06/17/2022
 Multiple Session Details Use Session Calculation Data Use 49% Override

 Save  Return to Search  Notify  Add  Update/Display

Return TIV Aid | Return of Funds Worksheet | Student/School Return | Post-Withdrawal Disbursement | Return TIV Aid Notes



Calculate Pct. TIV Aid Earned

Percentage of TIV Aid Earned

Date of Withdrawal	05/10/2022	Override	
Period Start Date	04/04/2022	Completed Days	37 N
Period End Date	06/17/2022	Student Adjustment	0
60 Pct Effective Dt		Total Days	75 N
Session Period Begin Date		Period Adjustment	0 N
Session Period End Date			
Completed Days for Period			
Total Days for the Period			
Total Session Break		<input checked="" type="checkbox"/> Use 49% Override	
Days Earned / In Term	0 / 0	H. Pct. TIV Aid Earned	100.00
		Calculate	

Holiday Adjustment

Holiday Schedule AHCCS Academic Holiday Calendar - CS

Holidays and Hours [Find](#) | [View All](#) | First  1 of 1  Last

Holiday	Hours	0.00
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Holiday Adjustment (Days) 0 (0) 0.00

OK **Cancel**



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Washington State Board for Community and Technical Colleges